

Self-Service Banner - My Requisitions User Guide

Part I - Gaining Access

1. Make sure you have **authorized Fund/Organization Originator access** in Banner. Obtain access by completing and submitting a [FOAPAL - Originator/View Access Request](#) under Work Resources tab of [My.MissouriState.edu](#) in the **Finance Assistance** section. You must have Originator access on a Fund/Organization before you can create requisition. [What does Approver, Originator or View Access mean?](#)

Finance Assistance

[Submit a Payment Request Form](#)

[FOAPAL - Originator/View Access Request](#)

[FOAPAL - Approver Access Request](#)

[Bear Finance Reporting](#)

2. Access Self-Service Banner **My Requisitions** Options.
From the Work Resources tab of [My.MissouriState.edu](#), click on **Finance Dashboard** to start.

Finance Resources

[Finance Dashboard](#)

Use the Finance Dashboard link to create and approve requisitions, purchase orders (West Plains only), check available balance, manage budget transfers, and view documents.

Once you click **Finance Dashboard** you should see the below menu items appear.

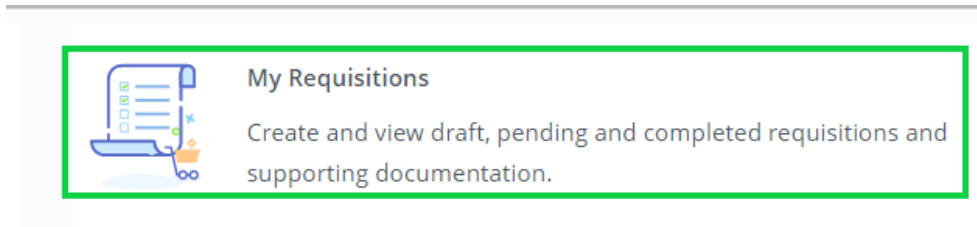
The screenshot shows a user interface for a Finance Dashboard. At the top, it says "Hello Xiaomin, Create, edit and approve transactions and view financial information for department / organization." Below this, there are several menu items, each with an icon and a description. The "My Requisitions" item is highlighted with a red box. The items are:

- My Finance Query**: Create, view and share budget availability, encumbrance and payroll queries.
- My Journals**: Create and view draft, pending and completed journals and supporting documentation.
- Approve Documents**: View list of documents pending approval. Approve, disapprove, or deny.
- Delete Finance Template**: Delete templates for Finance Queries, Budget Development, and Purchase Orders.
- My Requisitions**: Create and view draft, pending and completed requisitions and supporting documentation.
- Purchase Orders (West Plains Only)**: Create purchase orders or purchase orders in process.
- Budget Development**: Create and review fiscal year operating budgets for the budget development process.

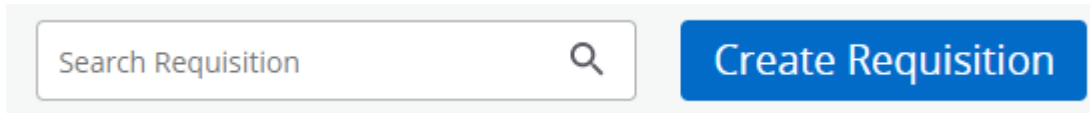
Part II - Creating a Requisition

Prepare to provide all information required by Procurement Services to complete your request for purchase.

1. From **My Finance Dashboard** click on **My Requisition** to start.



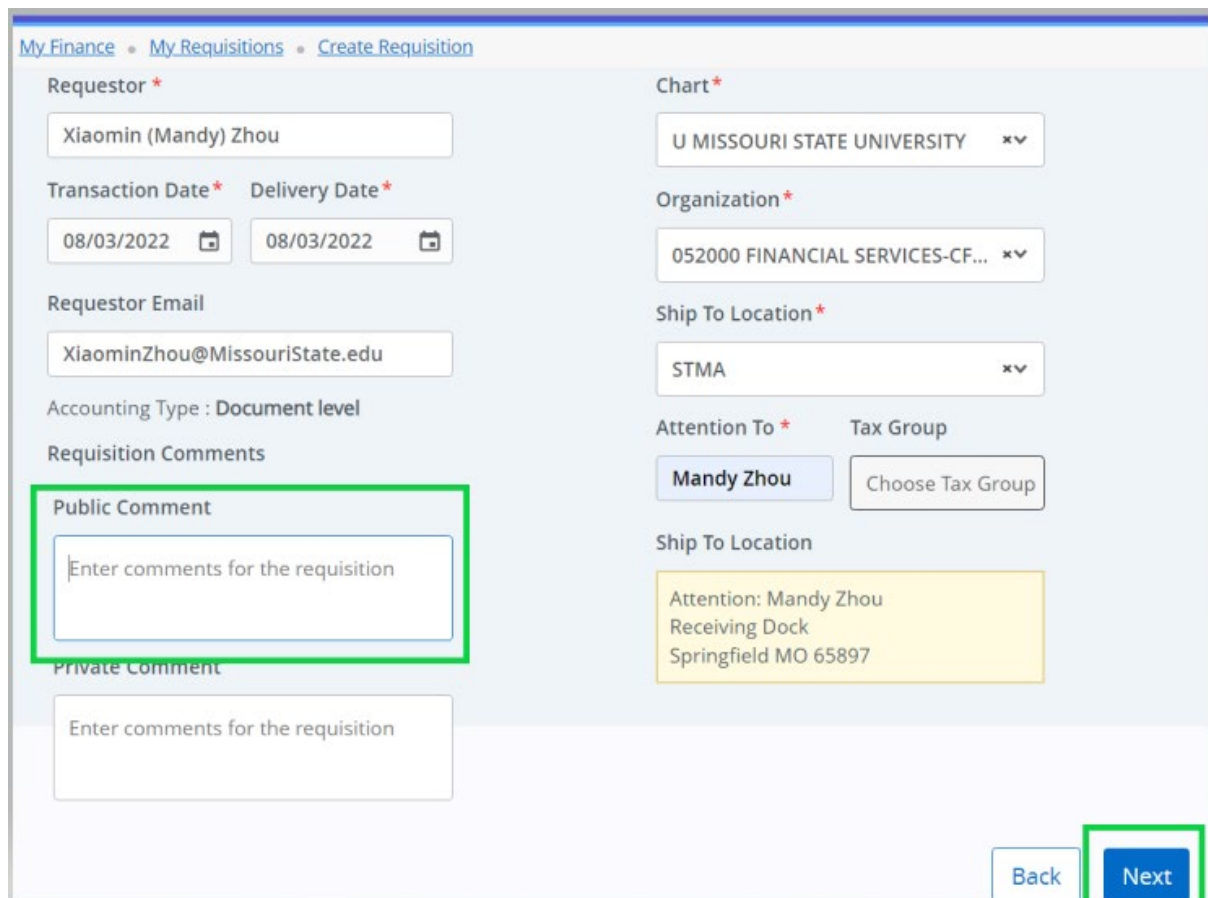
2. On the **My Requisitions** page, click **Create Requisition**.



3. On the **Requestor Information** page, fill out required information. All items with a red asterisk * are required fields (with exception of **Tax Group**).

Public Comment: Please always use **Public Comment** under **Requester Information's** tab for requisition's document text and such text will transferred over to Purchase Order. Please **DO NOT COPY AND PASTE!** This causes formatting issues on the PO. Provide a brief description of the services or items to be purchased.

DO NOT use **Private Comment** if you wish the **TEXT** to print on PO. Click **Next** to continue to the next page.

A screenshot of a web form titled "Create Requisition" within the "My Requisitions" section. The form is divided into two columns. The left column contains fields for "Requestor" (filled with "Xiaomin (Mandy) Zhou"), "Transaction Date" and "Delivery Date" (both filled with "08/03/2022"), "Requestor Email" (filled with "XiaominZhou@MissouriState.edu"), and "Accounting Type" (set to "Document level"). Below these are two text input areas for "Requisition Comments": "Public Comment" (highlighted with a green border) and "Private Comment". The right column contains dropdown menus for "Chart" (filled with "U MISSOURI STATE UNIVERSITY"), "Organization" (filled with "052000 FINANCIAL SERVICES-CF..."), and "Ship To Location" (filled with "STMA"). Below these are buttons for "Attention To" (filled with "Mandy Zhou") and "Tax Group" (filled with "Choose Tax Group"). At the bottom right of the form, there is a yellow box containing the address: "Attention: Mandy Zhou", "Receiving Dock", "Springfield MO 65897". At the very bottom of the page, there are two buttons: "Back" and "Next" (highlighted with a green border).

4. On the **Vendor Information** page, select the vendor for the requisition. By default, the **Choose vendor for me** check box is selected. When selected, the procurement office will choose a vendor for you when the requisition is turned into PO. Clear the check box if you want to select your own vendor. If vendor does not exist, contact Procurement Office at ProcurementServices@MissouriState.edu to have the vendor setup. **DO NOT** select a **Discount Amount**. Click **Next** to continue to the next page.

The screenshot shows the 'Vendor Information' step of a procurement process. At the top, there are three tabs: '1 Requestor Information', '2 Vendor Information' (which is active), and '3 Add Item & Accounting'. Below the tabs, there is a checkbox labeled 'Choose vendor for me'. Underneath, the 'Vendor' section features a search box with 'ellucian' entered. A dropdown menu is open, displaying several vendor options. The first option is highlighted in blue: 'Ellucian Company, LP (M02953124)' with the address '4375 Fair Lakes Ct Fairfax VA 22033-4234'. Other options include 'Ellucian Support Inc. (M00048472)' with two different addresses.

A vendor email address can be added by typing in the email address under Vendor Email. **DO NOT select a Discount or Currency.**

This screenshot shows the 'Vendor Information' step with more fields filled out. The 'Vendor' dropdown now shows 'Culligan Water of Springfield (M00120404)'. Below this, the 'Vendor Information' section is highlighted in yellow and contains the address: 'Culligan Water of Springfield (M00120404)', '2111 E Central Ct', and 'Springfield MO 65802'. The 'Vendor Email' field is a dropdown menu with the text 'Choose/Enter Email'. At the bottom, there are two dropdown menus for 'Discount' and 'Currency', both set to 'Choose Discount' and 'Choose Currency' respectively.

5. On the **Add Item & Accounting** page, add an item using the **Add Item(s)** field. If you type in the search line (by type or commodity code), the commodity code should appear, and you can select it. You may also choose one from the dropdown list.

The screenshot shows the 'Add Item & Accounting' step. At the top, there are three tabs: '1 Requestor Information', '2 Vendor Information', and '3 Add Item & Accounting' (which is active). Below the tabs, the 'Add Item(s)' section features a search box with 'speaker' entered. A dropdown menu is open, displaying a single option highlighted in blue: 'Service-Honorarium/Speaker (SE392)'.

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

Add Item(s)

Choose Item

CP120

Computer-Hardware-CPU 2w+1w (CP120)

After an item is selected, the page updates with required fields for the selected item. Choose the unit of measure, quantity and unit price for selected item. Leave **Tax Group, Discount Amount and Additional Amount** blank as these are not used.

Public Comment: Please always use Public Comment under Requester Information’s tab for requisition’s document text and such text will transferred over to Purchase Order. Please DO NOT use Private Comment if you wish the TEXT to print on PO.

Click **Save** to continue. The page refreshes with the item(s) you just added. You can click any item in the list to view its details or make change. Click **Save** to continue.

Repeat step 5 as necessary to add additional items (lines) to the requisition.

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

Item Code (CP120)

Computer-Hardware-CPU 2w+1w

Unit Of Measure* Tax Group*

EACH (EA) Choose Tax Group

Quantity* Unit Price*

5.00 125.0000

(Quantity) X (Unit Price) USD 625.00

Discount Amount Additional Amount

0.00 0.00

Tax Amount

0.00

Commodity Item Total USD 625.00

Commodity Comments

Public Comment

Enter comments for the commodity item

Private Comment

Enter comments for the commodity item

Back Save

A green message with your requisition number should appear at this point assigning the requisition number.

My Finance • My Requisitions • R0048669

R0048669 Attachments Delete Requisition

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

Add Item(s)
Choose Item

Commodities (2)

Computer-Hardware-CPU 2w+1w (CP120)	625.00
Quantity 1.00 @ 625.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00
Service-Information Management System 4w (SE420)	120.00

Requisition Summary Save as draft

Requisition Number R0048669

Elucian Company, LP (M02953124)
2003 Edmund Halley Dr Ste 500
Reston VA 20191-1108

Commodities (2)

Computer-Hardware-CPU 2w+1w (CP120)	625.00
Quantity 1.00 @ 625.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00
Service-Information Management System 4w (SE420)	120.00

Grand Total - All Commodities 745.00

Grand Total - All Accounting 0.00

Back Add Accounting View as PDF Submit Requisition

6. Click **Add Accounting** to continue to charge the item(s) to the budget/FOAPAL. The page refreshes with the required fields for accounting information.

Back Add Accounting

Charge \$625 for item/commodity code CP120 over to account code 73212, click **Split Accounting** to continue.

Charge \$120 for service item/commodity code SE420 to 73403, click **Save**.

The page refreshes with the item(s) added and its corresponding Funding (FOAPAL). You can click any commodity or funding item in the list to view its details or make change.

Attachments Delete Requisition

Requisition Summary Save as draft

Requisition Number R0048707

Elucian Company, LP (M02953124)
2003 Edmund Halley Dr Ste 500
Reston VA 20191-1108

Commodities (2)

cp120 (FR110)	625.00
Quantity 1.00 @ 625.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00
Service-Information Management System 4w (SE420)	120.00

Funding 100%

R0047704 Attachments Delete Requisition

1 Requestor Information

Requisition Number (R0047704) Currency USD

Chart *
U MISSOURI STATE UNI... Index
Choose Index

Fund *
Choose Fund

Organization *
052004 PROCUREMENT SERVICES

Account *
Choose Account

Program *
Choose Program Activity
Choose Activity

Location
Choose Location Project
Choose Project

3 Add Item & Accounting

Distribution Amount * Distribution Percent *

Discount Amount Additional Amount

Tax Amount

Distribution Total 625.00

Remaining 120.00

[Split Accounting →](#)

Requisition Summary [Save as draft](#)

Requisition Number R0047704

Commodities (2)

Computer-Hardware-CPU 2w+1w (CP120)	625.00
Quantity 1.00 @ 625.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00
Service-Information Management System 4w (SE420)	120.00

Accounting Total 0.00

Commodity Total 745.00

Balanced 0%

Grand Total - All Commodities 745.00

Grand Total - All Accounting 0.00

[View as PDF](#) [Submit Requisition](#)

[Back](#) [Save](#)

Attachments Delete Requisition

Requisition Summary [Save as draft](#)

Requisition Number R0048707

Ellucian Company, LP (M02953124)
2003 Edmund Halley Dr Ste 500
Reston VA 20191-1108

Commodities (2)	
cp120 (FR110)	625.00
Quantity 1.00 @ 625.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00
Service-Information Management System 4w (SE420)	120.00

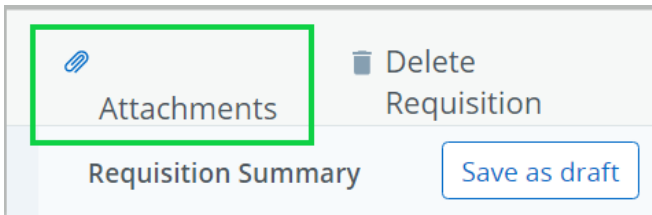
Funding	Amount
U-A02000-052000-73212-062	625.00
U-A02000-052000-73403-062	120.00
Accounting Total	745.00
Commodity Total	745.00

Balanced	100%
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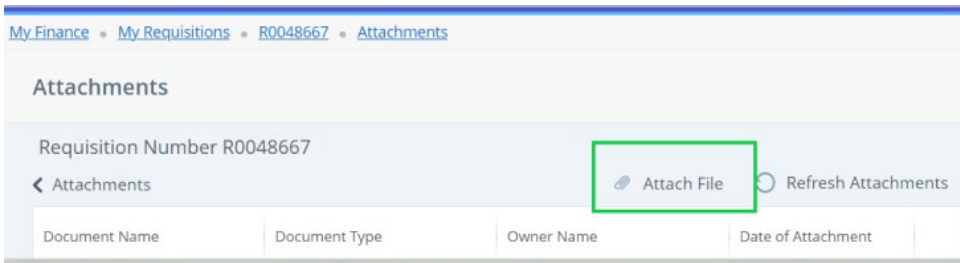
7. **Attach Supporting Document for Requisition.**

Click Attachments button on the upper right corner and follow the prompts to upload all supporting documents for your requisition. To have your requisition processed in a timely manner kindly attach backup documentation into to your requisition in SSB9. **For Annual Encumbrances** that are a re-occurring PO, please attach the previous year’s PO as the supporting documentation.

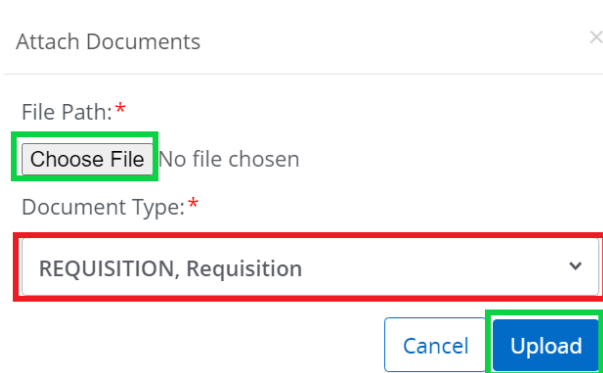
Click **Attachments**



Click **Attach File**



Click **Choose File** button to select your supporting document to upload. **PDF is Required.** Click **Upload.** It will attach the document to your requisition. **Document Type MUST ALWAYS be REQUISITION** before you upload. File size must be smaller than 10MB/10000 KB or the document will be rejected and will not upload.



Once uploaded successfully, you will be able to view the attachment or **delete** to start over.



8. Submit Requisition

Click **Submit Requisition** to submit your requisition for approval; or click on **Save as draft** if you want to return to the requisition to make changes before submitting.

The screenshot shows a 'Requisition Summary' form. At the top right, a 'Save as draft' button is highlighted with an orange box. The form contains the following information:

- Requisition Number: R0048707
- Supplier: Ellucian Company, LP (M02953124)
2003 Edmund Halley Dr Ste 500
Reston VA 20191-1108
- Commodities (2):
 - cp120 (FR110) 625.00
 - Quantity 1.00 @ 625.0000 Discount 0.00
 - Additional Charges 0.00 Tax 0.00
- Service-Information: Management System 4w (SE420) 120.00
- Funding: 100%
- Grand Total - All Commodities: 745.00
- Grand Total - All Accounting: 745.00

At the bottom, there are two buttons: 'View as PDF' and 'Submit Requisition', with the latter highlighted by a green box.

You will receive a (green) message if requisition was submitted successfully.

The screenshot shows a green success message: 'Requisition R0048707 completed successfully'. Below the message is a navigation bar with a search box labeled 'Search Requisition' and a blue button labeled 'Create Requisition'.

Submitted requisition will be under **Pending Requisitions** waiting for approval.

The screenshot shows a table titled 'Pending Requisitions' with a notification bubble containing the number '1'. The table has the following data row:

Requisition Number	Effective Date	Supplier	Amount	Status
R0048707	07/29/2022	Ellucian Company, LP	\$745.00	In Approval

If you are getting any other error message during the process of creating a requisition, please contact BannerFinance@missourstate.edu for assistance.

Part III - Other Features in My Requisition Dashboard

My Requisition Dashboard has three queues: Draft Requisitions, Pending Requisitions (awaiting approval) and Completed Requisitions.

My Requisitions

Requisition	Date	Vendor	Amount	Status
Draft Requisitions 2				
R0048707	07/29/2022	Ellucian Company, LP	\$745.00	Draft
R0047846	02/25/2022		\$50.00	Draft
Pending Requisitions 0				
Completed Requisitions 150				
R0048391	06/09/2022		\$72,220.59	Converted to PO ⓘ
R0048184	05/24/2022	Inside Track	\$16,500.00	Converted to PO ⓘ

- Requisition can be saved as Draft if you want to return to the requisition before you submit the requisition for approval. You can edit any requisitions in Draft status.
- You can any **Recall Requisition** in Pending Queue if it has no approval records yet.
 - To make change of a requisition in Pending Queue, you must recall the requisition first. Click on the requisition from Pending queue and Click on recall requisition on the upper right corner to recall. Once requisition recalled, it will go back to Draft Queue where you can edit or make change.
- You can **Delete** any requisition that is in Draft Status. If you have attached documents to your requisition, please delete attachment(s) first before deleting the requisition.
- **Disapproved Requisition, if not needed, must be deleted** or it would encumber funds and affect the balance available for use. Disapproved requisitions are under Draft Requisition queue where you must delete to disencumber the funds.
- You can copy a completed requisition and use it as a template for a new requisition. To copy a requisition, pick a requisition from your Completed Requisition queue, click on it to open this requisition, and then click on **Copy Requisition** on the upper right corner to make a copy.